



The Company You Keep®

New York Life Insurance Company
New York Life Insurance and Annuity Corporation
(A Delaware Corporation)
NYLIFE Insurance Company of Arizona
(Not licensed in every state)
P.O. Box 6916
Cleveland, OH 44101
1-800-695-9873
www.newyorklife.com

February 27, 2019

BARBARA JEAN BROWN FAMILY TRUST
267 S SUNSET DR
LITTLETON NC 27850

Annuitant(s): Barbara Jean Brown
Policy(s): 74 739 460
Claim No.: 606747
Beneficiary: Barbara Jean Brown Family Trust dated March 9, 1998 Second Restatement March 12, 2010

New York Life is here for you.

Dear Trustee(s):

Please accept our condolences for your loss. New York Life is committed to helping the beneficiary receive the benefits intended by our policy owner. To proceed with this claim, please submit the following:

- Death Benefit Proceeds form completed by the trustee(s) with the trust information, including the trust's Taxpayer Identification Number and signed by the trustee(s)
- Copy of the title, signature, and notary pages of the trust, including pages showing the trustee(s) and successor trustee(s), as well as any applicable amendments
- Confirmation of Trust completed by the trustee(s) with the trust information
- IRS form W-9 completed with the trust information including the trust's Tax Identification Number and signed by the trustee(s)

For your convenience, we have enclosed a postage paid return envelope. As soon as we receive the requested document(s), we will give this claim our immediate attention. Please be aware that any original documents needed to process this claim, such as the death certificate, will be retained in our records and cannot be returned.

If you think that we have been misinformed or if you have any additional information pertinent to the claim, please contact us at the toll-free number above. We will be pleased to consider any facts you submit. Any one of our representatives will be happy to assist you.

We stand by our promise to be there for our beneficiaries. Please know that our New York Life Agents are also here for you and may contact you to assist in the claim process, including delivery of the death benefit proceeds.

If you have any questions or need further assistance, please do not hesitate to contact a customer service representative at 1-800-695-9873 Monday through Friday, from 8 a.m. to 7 p.m. ET. Please say the word "Claims" at any time during the interactive menu to be transferred directly to the Claims Department.

On behalf of New York Life,
Mary Beth Duirk
Customer Service Claims

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